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ABSTRACT

Filing in all aspects--alphabetic, subject, numeric, geographic, and chronological--along with the organization and management of filing systems makes up the thrust of the course content in the curriculum guide. The objective is to prepare students for office occupations. Content includes course guidelines, performance objectives, learning activities, evaluative instruments, and student and teacher resources. More than one-half of the pamphlet contains appendixes of tests and keys. (NH)

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AUTHORIZED COURSE OF INSTRUCTION FOR THE QUINMESTER PROGRAM

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FILING AND FINDING

Business Education--7733.01 (New: 7742.01)

CE001871

DADE COUNTY PUBLIC SCHOOLS
DIVISION OF INSTRUCTION • 1971

ED 095317

FILING AND FINDING

7733.01 (New: 7742.01)

Business Education

Written by Mary Wessels
And Approved by the Business Education Steering Committee
For Quinmester Courses

for the

DIVISION OF INSTRUCTION
Dade County Public Schools
Miami, FL 33132
1972

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I. COURSE TITLE—FILING AND FINDING

II. COURSE NUMBER—7733.01 (New: 7742.01)

III. COURSE DESCRIPTION

A. Synopsis
Includes all aspects of filing using alphabetic, subject, numeric, geographic, and chronological systems; also includes organization and management of filing systems.

B. Textbook
One of the state adopted textbooks for filing or office practice and/or one of the school's choosing.

C. Occupational Relationships

Secretary	Data processing clerk
General office clerk	Records clerk
File clerk	

A knowledge of filing is useful in many occupations, clerical or professional.

IV. COURSE ENROLLMENT GUIDELINES

A. Prior Experiences Needed
The student should have attained the objectives of E-Z Way to Type or The Typewriter and You prior to enrollment in this course.

B. Pretest
A pretest should be administered at the beginning in order to determine if the student has attained the objectives of E-Z Way to Type or The Typewriter and You and to diagnose individual problems in order to determine placement within this course. It is therefore desirable that the pretest be designed to include the objectives of this course as well as prior courses.

C. Relation to Other Courses
Filing is a basic office skill; it is recommended that this course be taken before The Office in Action or Receptionist Training.

V. COURSE OF STUDY PERFORMANCE OBJECTIVES

Upon completion of this course, the students will be able to—

1. demonstrate a working knowledge of record controls using given cards with names of individuals and organizations that have an indefinite number of units by indexing, coding, and filing the cards alphabetically;

2. relate the filing process to the informational needs of a business by coding, filing, and finding a given number of miniature letters;

V. COURSE OF STUDY PERFORMANCE OBJECTIVES, Continued

3. set up a numeric filing system given the last number assigned in the file and 20 pieces of correspondence in an accumulated miscellaneous file;

4. code 20 pieces of correspondence for a geographic file;

5. demonstrate ability to locate ten geographic correspondents when given 3" x 5" cards arranged in alphabetical order and a geographic file;

6. demonstrate ability to file by subject by choosing the main heading under which to file ten pieces of correspondence and/or business forms and ability to identify proper cross references;

7. answer 20 questions correctly concerning the organization of the files, records, disposition, charge methods, follow-up methods, transfer methods, protection of records, and microfilming; and

8. type ten 3" x 5" index cards properly for an indexing system from given names, addresses, and other pertinent information.

VI. COURSE CONTENT

A. Equipment and Supplies
   1. Basic
      a. Typing desk
      b. Typewriter—manual or electric
      c. Chair (posture)
      d. Textbook and instructional materials
      e. Index cards (3" x 5")
      f. Paper and pencil
      g. Incoming and outgoing tray
      h. Stapler
      i. Erasers
      j. Card file boxes
      k. Vertical card files
      l. Filing cabinets
      m. Visible files
      n. Folders and guides of various types and sizes
      o. Tickler file
      p. Sorter
      q. Collection tray
   2. Supplementary
      a. Overhead and/or opaque projector and screen
      b. Filmstrip projector and screen
      c. Record player and records

B. Filing Records
   1. Nature and scope of filing systems
   2. Types of materials to be filed

VI. COURSE CONTENT, Continued

a. Correspondence
(1) Letters (incoming)
(2) Copies of outgoing letters
(3) Interoffice communications
(4) Telegrams, cablegrams, telefax
b. Mailing lists
c. Requisitions
d. Legal documents
e. Magazines
f. Magazine articles
g. Records
(1) Accounting
(a) Checks
(b) Sales
(2) Personnel
(3) Stock (inventory)
h. Reports
i. Special business documents
(1) Accounts
(2) Stocks and bonds
(3) Other

3. Organization of files
a. Guides
(1) Primary
(2) Secondary or auxiliary
(3) Special auxiliary
b. Tabs
c. Captions
d. Folders
(1) Full cut
(2) One-half cut
(3) One-third cut
(4) One-fifth cut
(5) Special
(6) Individual
(7) Miscellaneous

4. Basic filing procedures
a. Collecting papers for the file
b. Time stamp
c. Deliver
d. Release mark
e. Index
f. Code
g. Cross reference (when necessary)
h. Sort
i. File

C. Alphabetic Filing—Indexing Rules
1. Individual names
a. Nothing before something
b. Prefixes or surname particles

VI. COURSE CONTENT, Continued

c. Compound surnames
d. Initials and abbreviations
e. Titles
f. Married women
g. Unusual names

2. Business names
a. Words to disregard
b. Full individual names or individual surnames only
c. Famous names
d. Abbreviations and single letters
e. Compound and hyphened names
f. Titles
g. Numbers
h. Possessives
i. Identical
j. Compound geographic
k. Compound foreign

3. Other names
a. Hotels and motels
b. Schools
c. Colleges and universities
d. Churches and synagogues
e. Clubs and service organizations
f. Newspapers and periodicals
g. Governmental names
h. Political subdivisions
i. Foreign governments

D. Numeric Filing
1. Advantages and disadvantages
2. Index card control file
3. Miscellaneous alphabetic file
4. Accession book or register
5. Numeric coding
6. Terminal digit
7. Middle digit
8. Consecutive digit

E. Subject Filing
1. Direct subject method
2. Direct alphabetic method
3. Encyclopedic method
4. Alpha-numeric subject
a. Subject decimal
b. Direct decimal-subject

F. Geographic Filing
1. In an alphabetic system
2. By subjects

G. Commercial Filing Systems

VI. COURSE CONTENT, Continued

H. Records Management
   1. Organization
      a. Central files
      b. Desk files
      c. Departmental
   2. Charge methods
      a. Out card
      b. Out sheet
      c. Out guide
      d. Out folder
      e. Carrier folder
      f. Facsimile copies
      g. Cancelling charge-outs
   3. Follow-up
      a. Card tickler tracing file
      b. Follow-up for specific future date
      c. Dated follow-up folders
      d. Signal follow-up folders
   4. Alternative methods of managing records
      a. Facsimile copies
      b. Microfilm copies (sheet and roll)

I. Transferring Records
   1. Perpetual method
   2. Periodic methods and records center
      a. One-period plan—removal on certain date
      b. Two-period plan—duplicate files maintained, one active and one inactive
      c. Maximum-minimum plan—inactive material transferred at regular intervals

J. Retention and Disposition of Records

K. Protecting Vital Records

L. Microfilming
   1. Duplication copying
   2. Retrieval
   3. Communications
   4. Publishing
   5. Microfilm formats
   6. Roll
   7. Jackets
   8. Aperture Cards
   9. Microfilm filing

M. Information Retrieval Systems

VII. SUGGESTED PROCEDURES, STRATEGIES, AND LEARNING ACTIVITIES

A. Individualized Instruction

The teacher could prepare learning activity packages, assignment sheets, and/or job sheets. Indexing rules could be learned four or five at a time with practical application of these rules and self-evaluation (keys provided) immediately following. Memorization of rules is facilitated by use of filing sound-filmstrips (teacher-made, Gregg, or Coronet—see Resources for Students) and individual listening stations. Filing practice sets are available from many publishing companies (see Appendix). Self-checking devices, tests, and practical filing activities are provided in most of these practice sets.

Students should be encouraged to proceed at their own rates of speed; advanced filing activities should be prepared for the faster students. Such activities could include practical application of filing knowledge in the school's office, teachers' classrooms, or the school library. However, care should be taken to see that careful supervision is provided so that the students can participate in meaningful learning experiences.

B. Student Participation

Students could bring their favorite records to class. Index cards could then be prepared using the record titles as the primary reference. Cross references under the name of the composer and the artist could also be prepared. Similar activities could be provided by having students bring in letters or recipes.

C. Field Trips

The class could be taken to business offices to observe the various filing methods being used. If this isn't possible, the class could be taken on a tour of the school's main office to observe the manner in which school records are maintained. It is suggested that such activities should be arranged after most of the students have learned the basic filing principles.

D. Typing Index Cards

After most of the indexing rules have been learned, students could type 3" x 5" index cards for each person in the class or for each teacher in the school, typing names in proper indexing order. The cards could then be alphabetized.

Practice in typing index cards for a numeric filing system could be provided by having students type the names of the members of the football team (or another athletic team), and prepare a cross referencing system based on the players' jersey numbers.

Some local schools have addressing machines. Students could prepare and maintain address plates for the principal, PTA, FBLA, or other groups.

E. Timed Learning Activities

After a filing practice set or activity has been completed, the teacher should give the students an opportunity to evaluate their own progress. Since the reason for filing is finding, progress can be evaluated through the use of a finding test.

One suggestion for such an activity would be for the teacher to pass out a list of items, index cards, or correspondence for the students to locate. This list should be left face down on the students' desks until the teacher gives the word to start. A stopwatch or some other timing device should be started when the word is given. When a student locates all of the items on the list, he would bring his test to the front and the teacher would write the time taken to complete on the front of the test. Keys would then be made available so that the students could check the accuracy of their work. A total score could be computed by adding the time to the number of errors. Of course, students with the lowest number of points would have the best scores. The same procedure could be used for testing purposes, but the teacher would check the individual papers.

F. Other Teaching Suggestions

1. Current trends in filing tend to indicate that there is an increasing stress on the basic alphabetic system with numeric application. For example, social security numbers are now being issued to all ninth grade students in Dade County in order to provide student numbers. The University of Miami is also using these numbers for their students.

2. Filing rules should not be taught by rote but by application.

3. The development of skill in coding appears to be the most difficult phase of filing mastery, but it is an important key to filing success. Therefore, a great proportion of class time should be spent on the development of this skill.

4. The soundex filing system can be used to advantage, especially when foreign names are encountered. It can be taught in one or two class periods and is a very popular motivational device.

5. When a student is taking a series of office practice courses, it is recommended that he/she take this course as early in the sequence as possible in order to allow practice and use of filing skills in subsequent courses.

VIII. EVALUATIVE INSTRUMENTS

The following tests are examples of items that may be used to evaluate student progress. Examples are located in the Appendix.

ITEM	PURPOSE
A. Alphabetic Filing	To determine if the students are applying the filing rules.
1. Cards	When students have learned all the rules, a written test may be administered in which students are instructed to find a card and tell what is filed before and after the card. This type of test should be timed. Pupils should be able to "find" about three cards a minute.
2. Correspondence	To determine if the students are inspecting, indexing, and coding properly. After rules have been learned, students are ready to proceed to a correspondence practice set or sets. Most business education publishers have them available in aplhabetic, subject, numeric, and geographic systems.
3. Procedures	To test students on filing procedures and vocabulary.
B. Numeric Filing	To determine if the students are coding the correspondence and placing the number assigned to that individual in proper order.
C. Geographic Correspondence	To determine whether the students can file by geographic locations of state, city or town, and finally by the correspondent's name.
D. Subject Correspondence	To determine whether the students can recognize the main heading under which to file various topics or business papers and make proper cross-references.

VIII. EVALUATIVE INSTRUMENTS, Continued

ITEM	PURPOSE
E. Chronological Arrangement	To measure the students' ability to determine a follow-up date on an item, place it behind the correct monthly guide, and file the item in the appropriate day-date file of the current month.

A final examination for the course should measure achievement of all of the objectives of the course.

IX. RESOURCES FOR STUDENTS

A. Books and Booklets

Agnew, Peter L. and Meehan, James R. Clerical Office Practice, 3rd edition. Cincinnati: South-Western Publishing Co., 1961. (Unit 7)

Agnew, Peter L. and Meehan, James R. Secretarial Office Practice, 6th edition. Cincinnati: South-Western Publishing Co., 1960. (Unit 10)

Agnew, Peter L.; Meehan, James R.; and Oliverio, Mary Ellen. Secretarial Office Practice, 7th edition. Cincinnati: South-Western Publishing Co., 1966. (Unit 9)

Agnew, Peter L.; Meehan, James R.; and Pasewark, William R. Clerical Office Practice, 4th edition. Cincinnati: South-Western Publishing Co., 1967. (Unit 9)

Archer, Fred C.; Brecker, Raymond F.; Frakes, John C.; Stewart, Jeffrey R., Jr. General Office Practice, 3rd edition. New York: Gregg Division of McGraw-Hill Book Co., 1968. (Chapters 24, 25, 26, 27, and 28)

Bassett, Ernest D.; Agnew, Peter L.; and Goodman, David G. Business Filing and Records Control, 3rd edition. Cincinnati: South-Western Publishing Co., 1964.

Fahrner, William F. and Gibbs, William E. Basic Rules of Alphabetic Filing, Programmed Instruction. Cincinnati: South-Western Publishing Co., 1965.

Friedman, Sherwood and Grossman, Jack. Secretarial Practice. New York: Pitman Publishing Corporation, 1960. (Chapter 9)

Gregg, John Robert; Fries, Albert C.; Rowe, Margaret; and Travis, Dorothy L. Applied Secretarial Practice, 5th edition. New York: Gregg Division of McGraw-Hill Book Co., 1962. (Unit 17)

IX. RESOURCES FOR STUDENTS, Continued

A. Books and Booklets, Continued

Gregg, John Robert; Fries, Albert C.; Rowe, Margaret; and Travis, Dorothy L. Applied Secretarial Practice, 6th edition. New York: Gregg Division of McGraw-Hill Book Co., 1968. (Units 16 and 17)

Guthrie, Mearl R. Alphabetic Indexing, 3rd edition. Cincinnati: South-Western Publishing Co., 1965. (Text-Workbook)

Kahn, Gilbert; Yerian, Theodore; and Stewart, Jeffrey R. Progressive Filing, 8th edition. New York: Gregg Division of McGraw-Hill Book Co., 1969.

Office Girl's Workshop—Portfolios 1 through 17. Waterford: The Bureau of Business Practices, Inc., 1964.

Place, Irene and Popham, Estelle. Filing and Records Management. Englewood Cliffs: Prentice-Hall, Inc., 1966.

Principles of Indexing and Filing, 4th edition revised. Baltimore: The H. M. Rowe Company, 1954.

Selden, W.; Straub, L.; and Porter, L. Filing and Finding. Englewood Cliffs: Prentice-Hall, Inc., 1962.

Weeks, Bertha M. Filing and Records Management. New York: The Ronald Press, 1964.

Wood, Merle. Number Filing on the Job. Cincinnati: South-Western Publishing Co., 1972. (Text-Workbook)

B. Practice Sets and Workbooks

Workbooks are available for most of the textbooks listed in the previous section from the respective publishing companies.

Bassett, E. C.; Agnew, Peter L.; and Goodman, Daniel. Filing Office Practice, 3rd edition. Cincinnati: South-Western Publishing Co., 1964. (Practice Set)

Connor, Donald W., revised by. Filing Practice Workbook, 2nd and 3rd editions. New York: Pitman Publishing Corporation, 1958 and 1969.

Kahn, Gilbert; Stewart, Jeffrey R.; and Yerian, Theodore. Gregg Quick Filing Practice. New York: Gregg Division of McGraw-Hill Book Co., 1965.

Kahn, Gilbert; Yerian, Theodore; and Stewart, Jeffrey R. Progressive Filing Practice Set (Kit), 8th edition. New York: Gregg Division of McGraw-Hill Book Co., 1969.

IX. RESOURCES FOR STUDENTS, Continued

B. Practice Sets and Workbooks, Continued

Rowe Filing Practice Set, 2nd edition, revised. Baltimore: The H. M. Rowe Company, 1955. (Instruction book, file box with guides and folders, and container envelope with 100 letters and 32 cross reference sheets are purchased separately.)

C. Filmstrips and Transparencies

Business Filing, Filmstrip Series. Chicago: Coronet Films.

Kahn, Gilbert and Stewart, Jeffrey R. Gregg Filing Transparencies, Volume 1, Alphabetic Indexing and Volume II, Systems and Procedures. New York: Gregg Division of McGraw-Hill Book Co., 1972.

Kahn, Gilbert; Yerian, Theodore; and Stewart, Jeffrey R. Progressive Filing Series, Complete filmstrip set. New York: Gregg Division of McGraw-Hill Book Co.

Travis, Dorothy. EDL Filing Filmstrip Set. New York: Gregg Division of McGraw-Hill Book Co.

X. RESOURCES FOR TEACHERS

A. Books, Manuals, and Handbooks

Teacher editions, handbooks, keys, and/or manuals are available to accompany most of the books and materials listed in the "Resources for Students" division of this course. They are usually available free if the school is using a class set or more of the respective publisher's textbooks. Additional books and booklets that may be of value to the teacher follow.

Blegen, August H. Records Management Step-by-Step. Stanford: Office Publications, Inc., 1965.

Bourne, Charles P. Methods of Information Handling. New York: John Wiley & Sons, Inc., 1963.

Chamberlain, Coleman R. Filing Facts. New York: National Filing Aid Bureau, 342 Madison Avenue, 1963.

Griffin, Mary C. Records Management, A Modern Tool for Business. Boston: Allyn and Bacon, Inc., 1964.

Guide to Record Retention Requirements. Washington, D. C.: Government Printing Office, 1962.

Kaiser, Julius. The Paperwork Jungle. New York: Dartnell Corporation, 1968.

X. RESOURCES FOR TEACHERS, Continued

A. Books, Manuals, and Handbooks, Continued

Littlefield, C. L. and Peterson, R. L. Modern Office Management. Englewood Cliffs: Prentice-Hall, Inc., 1956.

Terry, George R. Office Management and Control, 4th edition. Homewood, IL: Richard D. Irwin, Inc., 1965.

B. Periodicals

Balance Sheet, The. Cincinnati: South-Western Publishing Company. Monthly, October through May.

Business Education Forum. Washington: National Business Education Association. Monthly, October through May.

Business Education World. New York: Gregg Division of McGraw-Hill Book Co. Five issues yearly.

Journal of Business Education. East Stroudsburg: Robert C. Trethaway. Monthly, October through May.

Modern Office Procedures. Cleveland: The Industrial Publishing Co., Division of Pittway Corporation. Monthly.

Office, The. Philadelphia: Office Publications, Inc. Monthly.

Today's Secretary. Teacher's edition. New York: Gregg Division of McGraw-Hill Book Co. Monthly.

C. Wall Charts

Gregg Filing Wall Charts. New York: Gregg Division of McGraw-Hill Book Co. (Set of eight)

D. Films

Filing Procedures in Business. Color, 13½ min., 16mm, Instructional Materials Catalog, Dade County Public Schools, 1-11570.

Filing Procedures in Business, 2nd edition. Color or B/W, 13½ min., 16mm. Chicago: Coronet Films.

APPENDIX

ALPHABETIC FILING TEST

Directions: After each group, indicate the order in which the names given should be arranged in an alphabetic file.

EXAMPLE: (a) John Reynolds; (b) Walter Richardson; (c) J. Price . cab

1. (a) 11th Hour Cleaners; (b) 7 to 11 Supermarket; (c) 2-Minute Car Wash . . . . . ___

2. (a) Charles A. Quincy; (b) Charles S. Quinn; (c) Charles W. Quince . . . . . ___

3. (a) By the Road Inn; (b) Rest Haven Motel; (c) Best Well Hotel . . . . . ___

4. (a) B. P. Cramer; (b) B. O. Cramer; (c) B. U. Cramer . . . . . ___

5. (a) South East Timber Products, Inc.; (b) Southeast Utilities Inc.; (c) Southern Paper Co., Inc. . . . . ___

6. (a) Chas. Helms; (b) Charlene Harris; (c) Barbara Hoggard . . ___

7. (a) Victor C. Vinson; (b) C. Vinson; (c) Victor Vinson . . . . ___

8. (a) Jeff O'Neil; (b) Jefferson O'Neil; (c) J. J. Neilson . . . ___

9. (a) D. and O. Corporation; (b) DCO Co.; (c) Coretta Sue Dolman ___

10. (a) Cmdr. Perry; (b) Carlton Perriman; (c) Percy C. Cojock . . ___

11. (a) Peace Motel; (b) Peace Hotel; (c) Blackstone Inn . . . . . ___

12. (a) Reynolds'; (b) Mary E. Reynolds; (c) Mary Ellen Reynolds . ___

13. (a) Mary St. James; (b) Mary S. James; (c) Maureen Sammons . . ___

14. (a) Brien O. Percy; (b) Brian Oscar Percy; (c) Brien Percy . ___

15. (a) Paul's Mkt.; (b) Mfg. for Progress, Inc.; (c) O. A. Massey . . . . . ___

16. (a) One Bill Credit Plan; (b) $1000 Club; (c) 102 Street Garage . . . . . ___

17. (a) John Tyler Motel; (b) The College Inn; (c) Davidson Motel ___

18. (a) Shelby's; (b) Aileen Shelby; (c) A. Shelby . . . . . ___

19. (a) Ella E. Van Dorn; (b) Debra VanHorne; (c) Harold H. Horne ___

20. (a) Allen J. King; (b) Alan James King; (c) Alton J. King . . ___

ALPHABETIC FILING TEST, Continued

21. (a) Norris B. Haver; (b) Oscar E. Bell; (c) Norman Bell-Haven . . . . . ___ bca

22. (a) Clifton-Davis Florists; (b) Eva J. Clifton; (c) Donald D. Davis . . . . . ___ abc

23. (a) Father Flannigan; (b) Faye Fuller (Mrs. Wm. C. Fuller); (c) The Fulton Monument Co. . . . . ___ abc

CODING FOR FILING

Directions: (1) On each of the following cards, type or write the name in correct indexing order on the top line of the card.
(2) Underline the entire first indexing unit of the name.
(3) Number the remaining units in the name by writing above those units the numbers 2, 3, and so on, to indicate the rank of the units in the indexing order. Place the title (Mr., Miss, Etc.) in parentheses after the name.

Miss Helen Claire DeLong 1902 Commons Boulevard Boston, MA 02115		Mr. Lawrence Lynn Smith 12121 Lake Road Duluth, MN 55814	
RCA Service, Inc. 222 Ocean View Drive Honolulu, HI 96813		Miss Mary Lou St. John 32 Eastwood Circle Alexandria, VA 22321	
Johns-Richardson, Inc. 1002 Mountain Road Fairbanks, AK 99701		100 Dealers Association 9904 Penn Highway Philadelphia, PA 19136	

Sister Anne Marie St. Paul Convent 2514 Smith Street Hagerstown, MD 21746		Mrs. Charles (Marie) Peters 3395 Third Street Gary, IN 46419	
Fine-Fit Custom Clothes 2222 Prospect Street Nashville, TN 37226		South Eastern Motor Service 1229 Carlyon Road Augusta, GA 30904	
Rev. R. Arnold Jones 3399 Rosemond Avenue Bridgeport, CT 06611		New York Catering Service 2212 Fifth Avenue New York, NY 10048	
Chicken Take-Out Center 196 Lamberton Road Concord, NH 03321		Mr. Cort Johnson 900 Pueblo Boulevard Pueblo, CO 81015	

CODING FOR FILING KEY

Chicken Take-Out Center

Delong, Helen Claire (Miss)

Fine-Fit Custom Clothes

Johns-Richardson, Incorporated

Johnson, Cort (Mr.)

Jones, R. Arnold (Rev.)

One-Hundred Dealers Association

New York Catering Service

Peters, Marie L. (Mrs. Charles)

R C A Service, Incorporated

Sister Anne Marie

Smith, Lawrence Lynn

South Eastern Motor Service

St. John, Mary Lou (Miss)

CORRESPONDENCE FILING TEST

Directions: Below are the names of ten individuals, firms, and institutions taken from the correspondence file. In the columns headed Names Written for Indexing, write the names in the correct form for indexing. In the columns headed Correct Arrangement, arrange the names in correct alphabetic order.

Names	Names Written for Indexing		
	Unit 1	Unit 2	Unit 3
1. Miller Bros.			
2. Miller Co.			
3. Thomas Ludwig Miller			
4. Colby B. Miller			
5. Conrad Miller, Inc.			
6. Thomas Louis Miller			
7. Miller Commission Co.			
8. B. Warren Miller			
9. Thomas Miller, Ltd.			
10. Conrad Ince Miller			

Correct Arrangement

Unit 1	Unit 2	Unit 3

CORRESPONDENCE FILING TEST, Continued

Directions: Below are the names of ten individuals, firms, and institutions taken from the correspondence file. In the columns headed Names Written for Indexing, write the names in the correct form for indexing. In the columns headed Correct Arrangement, arrange the names in correct alphabetic order.

Names	Names Written for Indexing				
	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5
1. Lewis S. Bates Infirmary					
2. Bates Insurance Agency					
3. L. Bates					
4. L. S. Bates Coal Company					
5. L. Stephen Bates					
6. Bates Lumber Yard					
7. Bates Loan Office					
8. L. Bates Lock Services					
9. Bates Library Foundation					
10. Bates Leather Company					

Correct Arrangement				
Unit 1	Unit 2	Unit 3	Unit 4	Unit 5

CORRESPONDENCE TEST KEY

Names Written for Indexing and Correct Arrangement

Unit 1	Unit 2	Unit 3
Miller	B.	Warren
Miller	Bros.	
Miller	Colby	B
Miller	Commission	Company
Miller	Company	
Miller	Conrad	Ince
Miller	Conrad	Incorporate
Miller	Thomas	Limited
Miller	Thomas	Louis
Miller	Thomas	Ludwig

Unit 1	Unit 2	Unit 3	Unit 4	Unit 5
Bates	Insurance	Agency		
Bates	L.			
Bates	L.	Lock	Services	
Bates	L.	S.	Coal	Company
Bates	L.	Stephen		
Bates	Leather	Company		
Bates	Lewis	S.	Infirmary	
Bates	Library	Foundation		
Bates	Loan	Office		
Bates	Lumber	Yard		

PROCEDURES FILING TEST

Which of these terms . . .

1. Auxiliary guide	10. Folder	19. Out folder
2. Cabinet	11. Follow-up	20. Periodic transfer
3. Card files	12. Given name	21. Perpetual transfer
4. Carrier folder	13. Guide	22. Requisition slip
5. Charge method	14. Indexing	23. Surname
6. Cycle method	15. Individual folder	24. Tab
7. Disposing	16. Legal name	25. Title
8. Expansion	17. Microfilming	26. Unit
9. Filing period	18. Miscellaneous	27. Vertical filing
		28. Visible filing

. . . may be described in these words:

		KEY
EXAMPLE:	Storage of records in specially designed equipment so that the information near the edges can be seen easily	28
1.	A span of time during which records remain in the active file	___ 9
2.	A man's full name	___ 16
3.	Purpose for scores along the front flap of a file folder .	___ 8
4.	The last name of an individual	___ 23
5.	Selecting the captions under which a record is to be filed	___ 14
6.	A manila container which holds correspondence in files . .	___ 10
7.	Eliminating records which are no longer used	___ 7
8.	Contains records for correspondents or subjects not active enough to warrant individual folders	___ 18
9.	An individual's first name	___ 12
10.	Folder for storing correspondence while regular folder is out of the files	___ 19
11.	Constant removal of records from current to inactive files	___ 21
12.	A container with drawers for housing filed records	___ 2
13.	A folder used to transport records	___ 4
14.	Removal of records from current to inactive files at stated intervals	___ 20
15.	Divided into two basic kinds: visible and vertical . . .	___ 3

PROCEDURES FILING TEST, Continued

16.	A projection above the body of guides and folders on which the caption appears	___	24
17.	Serves as a support for the records in the file drawer .	___	13
18.	Equivalent to the two-period transfer plan	___	6
19.	Storage of records on edge	___	27
20.	Folder that contains records concerning only one correspondent	___	15
21.	Considered an indexing unit only when it precedes a single name	___	11
22.	Photographing records in a greatly reduced size to conserve filing space	___	17
23.	Each part of a name used in indexing	___	26
24.	Checking on borrowed records to effect their return to the files	___	11
25.	A procedure used to affix responsibility for records that have been removed from the files	___	5
26.	Subdivides the section of a file controlled by a primary guide	___	1
27.	A form used to request records from the files	___	22

GEOGRAPHIC CORRESPONDENCE FILING TEST

Directions: Type the following names and addresses on cards. Arrange the list geographically considering first the state location, then the city or town location, and finally the correspondent's name. Correct any errors.

(a) William H. Behrens
West Beach Blvd.
Biloxi, MS 39530

(b) M. L. James
Highway 16
Jackson, MN 56143

(c) Keenan Bros.
Hennepin Ave.
Minneapolis, MN 55400

(g) Helen Townsend
S. Saginaw St.
Flint, MI 48500

(h) Mary James
University Ave.
St. Paul, MN 55100

(i) Clancy Rug Service
East Capitol St.
Jackson, MS 39200

(j) The Robert Geyer Co.
9th Ave.
St. Cloud, MN 56301

(k) Van Houten Agency
E. Kirby Ave.
Detroit, MI 48200

(l) Main Auto Sales
Spring Arbor Road
Jackson, MI 56143

(m) F. W. Zoller
Michigan Ave.
Dearborn, MI 48120

(d) Scott Moving Co.
Monroe Ave.
Grand Rapids, MI 49500

(e) William J. Behrens
14th St.
Gulfport, MS 39501

(f) Philip LaMarca
2nd Ave.
Rochester, MN 55901

(n) Dr. A. T. Dailey
Clay St.
Vicksburg, MS 39180

(o) Thomas Winslow
Temple St.
Detroit, MI 48200

(p) Emerson Laundry Service
5th St.
Meridian, MS 39301

(q) R. Miller
South Thayer St.
Ann Arbor, MI 48103

(r) Martin Frisch
Pearl St.
Natchez, MS 39120

(s) Richard Horn
E. Superior St.
Duluth, MN 55800

(t) R. A. Miller
Washington St.
Battle Creek, MI 49014

GEOGRAPHIC CORRESPONDENCE FILING TEST KEY

(a) Mich., Ann Arbor
R. Miller
South Thayer Street

(b) Mich., Battle Creek
R. A. Miller
Washington Street

(c) Mich., Dearborn
F. W. Zoller
Michigan Avenue

(d) Mich., Detroit
Van Houten Agency
East Kirby Avenue

(e) Mich., Detroit
Thomas Winslow
Temple Street

(f) Mich., Flint
Helen Townsend
South Saginaw Street

(g) Mich., Grand Rapids
Scott Moving Co.
Monroe Avenue

(h) Mich., Jackson
Main Auto Sales
Spring Arbor Road

(i) Minn., Duluth
Richard Horn
East Superior Street

(j) Minn., Jackson
M. L. James
Highway 16

(k) Minn., Minneapolis
Keenan Bros.
Hennepin Avenue

(l) Minn., Rochester
Phillip LaMarca
Second Avenue

(m) Minn., Saint Cloud
Robert Geyer Co. (The)
Ninth Avenue

(n) Minn., Saint Paul
Mary James
University Avenue

(o) Miss., Biloxi
William H. Behrens
West Beach Blvd.

(p) Miss., Gulfport
William J. Behrens
14th Street

(q) Miss., Jackson
Clancy Rug Service
East Capitol Street

(r) Miss., Meridian
Emerson Laundry Service
Fifth Street

(s) Miss., Natchez
Martin Frisch
Pearl Street

(t) Miss., Vicksburg
A. T. Dailey (Dr.)
Clay Street

NUMERIC FILING TEST

It is recommended that the teacher prepare a numeric filing test and key by using the ZIP codes for the names and addresses in the "Geographic Correspondence Filing Test."

SUBJECT CORRESPONDENCE FILING TEST

PART I:

Directions: Alphabetize the following categories under Automobile Accessories and Supplies, Garden Equipment and Supplies, and Household Appliances and Supplies. One category may have more than one classification.

(a) Seeds
(b) Tires
(c) Fertilizers
(d) Freezers
(e) Dish Washers
(f) Car Batteries
(g) Lawn Mowers and Sweepers
(h) Floor Polishes and Waxes
(i) Home Air Conditioners
(j) Spades, Rakes, Hoes, and other Hand-Planting Tools
(k) Sewing Machines
(l) Auto Tools
(m) House Radios
(n) Washing Machines
(o) Wheelbarrows and other Outside Wheel Tools
(p) Vacuum Cleaners
(q) Refrigerators
(r) Car Heaters
(s) Seat Covers
(t) Clothes Dryers
(u) Oil and Antifreeze
(v) Stoves and Ranges
(w) Hose and Sprinklers
(x) Dehumidifiers

PART II:

Directions: The Live and Let Live Drug Store has three primary captions in its subject file: Alphabetize the following under Cameras and Accessories, Cosmetics, and Medicines.

(a) Vitamins
(b) Compacts
(c) Face Powder and Rouge
(d) Projectors
(e) Film
(f) Headache Remedies
(g) Light Meters
(h) Lipsticks
(i) Nail and Hand Beautifiers
(j) Laxatives
(k) Stomach Pills
(l) Filters
(m) Beauty Creams
(n) Liniments
(o) Eye Make-Up
(p) Flash Bulbs
(q) Hair Shampoos and Lotions
(r) Bandages and Adhesive Tapes
(s) Perfumes
(t) Enlargers
(u) Shaving Preparations
(v) Screens
(w) Cameras
(x) Cold Medicines
(y) Dental Supplies and Mouth Remedies

SUBJECT CORRESPONDENCE FILING TEST KEY

PART I:

1. Autombile Accessories and Supplies

   a. Auto Tools
   b. Car Batteries
   c. Car Heaters
   d. Dehumidifiers
   e. Oil and Antifreeze
   f. Seat Covers
   g. Tires

2. Garden Equipment and Supplies

   a. Fertilizers
   b. Hose and Sprinklers
   c. Lawn Mower and Sweepers
   d. Seeds
   e. Spades, Rakes, Hoes, and other Hand-Planting Tools
   f. Wheelbarrows and other Outside Wheel Tools

3. Household Appliances and Supplies

   a. Clothes Dryers
   b. Dehumidifiers
   c. Dish Washers
   d. Floor Polishers and Waxes
   e. Freezers
   f. Home Air Conditioners
   g. House Radios
   h. Refrigerators
   i. Sewing Machines
   j. Stoves and Ranges
   k. Vacuum Cleaners
   l. Washing Machines

PART II:

1. Cameras and Accessories

   a. Camera
   b. Enlargers
   c. Film
   d. Filters
   e. Flash Bulb
   f. Light Meters
   g. Projectors
   h. Screens

2. Cosmetics

   a. Beauty Creams
   b. Compacts
   c. Eye Make-Up
   d. Face Powder
   e. Hair Shampoos and Lotions
   f. Lipstick
   g. Nail and Hand Beautifiers
   h. Perfumes
   i. Rouge

3. Medicines

   a. Bandages and Adhesive tapes
   b. Cold Medicines
   c. Dental Supplies and Mouth Remedies
   d. Headache Remedies
   e. Laxatives
   f. Liniments
   g. Stomach Pills
   h. Vitamins

CHRONOLOGICAL FILING TEST

1. What is the purpose of a chronological file?

   Purpose—To call attention to dates and deadlines and data that must be completed at definite intervals. Items requiring attention at some future time will be filed not by name or number, but by action date.

2. What method would you use to set up and keep a chronological file?

   Method—The follow-up (or chronological) file can be kept in front of a drawer in the regular files; or it can be kept in a tub file, desk tray, or a desk-drawer file. There is a guide and folder for every month and a set of guides and a folder for each day of the month, numbered 1 through 31. Items that require future attention are filed according to a specific month and day.

3. Give four steps you would use in chronological filing.

   FILING Steps—Filing in the chronological file consists of several quick steps:

   1. Determine a follow-up date; note this date on the item by writing, underscoring, or by some other means.

   2. Place the item behind the correct monthly guide.

   3. If a follow-up is to occur in the current month, file the item in the appropriate day-date file.

   4. At the beginning of every new month, items filed originally in the monthly folder are refiled in the daily folder.

CHRONOLOGICAL ARRANGEMENT TEST

Directions: Arrange the following dates in chronological order in the proper columns at the bottom of the page. Work as rapidly as you can.

May 30, 1965	Nov. 30, 1965	Nov. 12, 1970	Oct. 7, 1971
Aug. 1, 1965	Jan. 2, 1969	Aug. 1, 1969	Dec. 1, 1965
Jan. 3, 1969	Dec. 30, 1965	July 4, 1965	Dec. 15, 1968
Jun. 4, 1965	May. 11, 1965	May 10, 1966	Oct. 12, 1966
Sept. 15, 1969	Dec. 13, 1968	July 1, 1965	March 31, 1965
Jan. 1, 1965	May 12, 1965	April 30, 1967	Jan. 2, 1970
Oct. 14, 1968	Dec. 31, 1965	Dec. 16, 1968	May 8, 1970
Jan. 2, 1965	March 6, 1965	Jan. 31, 1965	Nov. 11, 1965
March 1, 1966	Nov. 16, 1965	March 11, 1967	June 28, 1969
Jan. 4, 1970	June 30, 1965	March 19, 1967	June 30, 1967
March 4, 1965	May 11, 1967	June 30, 1969	Jan. 3, 1970
Sept. 6, 1965	Oct. 17, 1965	April 25, 1965	April 9, 1966
Feb. 12, 1966	Jan. 21, 1966	Jan. 3, 1965	Dec. 14, 1967

Jan. 1, 1965 to June 30, 1965	July 1, 1965 to Nov. 30, 1965	Dec. 1, 1965 to May 10, 1966
May 11, 1966 to Dec. 15, 1968	Dec. 16, 1968 to Jan. 2, 1970	Jan 3, 1970 and after

CHRONOLOGICAL ARRANGEMENT KEY

Jan. 1, 1965 to June 30, 1965	July 1, 1965 to Nov. 30, 1965	Dec. 1, 1965 to May 10, 1966
Jan. 1, 1965	July 1, 1965	Dec. 1, 1965
Jan. 2, 1965	July 4, 1965	Dec. 30, 1965
Jan. 3, 1965	Aug. 1, 1965	Dec. 31, 1965
Jan. 31, 1965	Sept. 6, 1965	Jan. 21, 1966
March 4, 1965	Oct. 17, 1965	Feb. 12, 1966
March 6, 1965	Nov. 11, 1965	March 1, 1966
March 31, 1965	Nov. 16, 1965	April 9, 1966
April 25, 1965	Nov. 30, 1965	May 10, 1966
May 11, 1965		
May 12, 1965		
May 30, 1965		
June 4, 1965		
June 30, 1965		

May 11, 1966 to Dec. 15, 1968	Dec. 16, 1968 Jan. 2, 1970	Jan. 3, 1970 and after
May 11, 1966	Dec. 16, 1968	Jan. 3, 1970
Oct. 12, 1966	Jan. 2, 1969	Jan. 4, 1970
March 11, 1967	Jan. 3, 1969	May 8, 1970
March 19, 1967	June 28, 1969	Nov. 12, 1970
April 30, 1967	June 30, 1969	Oct. 7, 1971
June 30, 1967	Sept. 15, 1969	
Dec. 14, 1967	Aug. 1, 1969	
Oct. 14, 1968	Jan. 2, 1970	
Dec. 13, 1968		
Dec. 15, 1968		